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PERSONNEL

FITNESS REPORT

SYNOPSIS: This regulation prescribes the policies, responsibilities, and procedures for the preparation of Fitness Reports which record supervisors' evaluations of employees assigned to positions at headquarters, the

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Rescissions: (1) [REDACTED] dated 21 September 1954
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1. GENERAL

This regulation prescribes Agency policies, responsibilities, and procedures concerning the preparation of Fitness Reports for staff employees and staff agents, except on those employees at the super-grade level (GS 16-17 and 18) who will be evaluated in memorandum reports prepared by their superiors.

2. POLICY

- a. The Agency will continuously evaluate the performance and potential of its employees as a management and planning aid and will ensure that employees are informed concerning the effectiveness of their work performance.

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b. The Fitness Report will be used to record such evaluations periodically. It will consist of a two-part form, designed to provide a means of evaluating the productivity and the potential of employees:

(1) Form No. 45: Fitness Report (Performance - Part I) will be used to provide the supervisor with a means of evaluating the productivity of the employee being rated. This part of the Fitness Report will be completed in all cases in which a report is required, and will be shown to the individual being rated at the time it is completed except that the supervisor may elect not to show the Report, other than a Report supporting an adverse action, when one or more of the following conditions prevail:

- (a) When there exists unusual operational circumstances such as those at a small station where the rater and individual being evaluated are working and living in very close proximity and constant social interchange between them is necessary;
- (b) When, for medical or psychological reasons, it would be ill-advised to show the individual the report;
- (c) When security considerations preclude showing the report;
- (d) When the supervisor and individual being rated are so physically separated that it is impractical to show the report.

When the supervisor elects not to show the Report to the individual being rated, for one or more of the above reasons, he shall give

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~~may~~ ^{will} the reasons for his action in Section B of Part I. The individual subsequently be shown the report by the head of his Career Service upon request, security considerations permitting.

- (2) Form No. 45: Fitness Report (Potential - Part II) will be used to provide supervisors with a means of evaluating the potential and work environment characteristics of the employee being rated. Completion of this part of the Fitness Report is required for initial and annual reports only, on professional and technical employees in grades GS-5 and above. This part will not be shown to the individual being evaluated.

3. RESPONSIBILITIES

a. SUPERVISORS

- (1) Supervisors at all levels are responsible for the continuous evaluation of the performance and potential of employees under their immediate supervision and for the preparation of Fitness Reports in accordance with the provisions of this regulation.
- (2) ^{Reviewing Official} ~~The supervisor next in line of authority above the supervisor who prepares the report~~ is responsible for reviewing ^{the Report} it in order to ensure that it ^{fully} ~~is~~ completed. ^{if he feels that} ~~and that~~ the immediate supervisor has ~~neither overevaluated nor~~ ^{or} underevaluated the individual concerned. ^{he will place his comments in the space provided on the Form} He will also consider whether any action should be recommended on the basis of the Report, and advise

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the supervisor with respect to taking such action. His signature on the Report signifies agreement with the ratings unless otherwise noted.

b. DEPUTY DIRECTORS

The Deputy Directors are responsible for ensuring that Fitness Reports for all employees under their jurisdiction are prepared and transmitted in accordance with the provisions of this regulation.

c. THE DIRECTOR OF PERSONNEL

The Director of Personnel is responsible for administering the provisions of this regulation; for providing assistance and guidance to supervisors at all levels; and for reviewing the overall effectiveness of this evaluation program.

4. TYPES OF FITNESS REPORTS

a. INITIAL REPORT

Form No. 45, Fitness Report (Performance - Part I) and (Potential - Part II) will be prepared for each employee, as of nine months after his entrance on duty with the Agency. This report is of particular importance for selection purposes in providing a record of the supervisor's evaluation of the individual before completion of the twelve-month trial period. Preparation of the Report by the current supervisor is required regardless of the length of time the employee has been under his jurisdiction.

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The current supervisor may request advice and information regarding any point covered by the Report from others who have supervised the individual during the period covered. Normally, the Fitness Report must be completed and forwarded not more than 15 days after the indicated due date. Submission of a Report may be delayed, however, for a period not to exceed 30 days beyond the due date in order to provide the supervisor with additional time to evaluate an employee who has been under his jurisdiction for a period of less than 90 days as of the due date of the Report.

b. ANNUAL REPORT

added here
A Fitness Report (Performance - Part I) and (Potential - Part II) will be prepared for each employee ^{to cover the} twelve months following the completion of the employee's first nine months of service and annually thereafter. The current supervisor will defer the completion and submission of an annual Report until the individual being rated has been under his jurisdiction for a period 90 days, in order to adequately evaluate the employee.

c. REASSIGNMENT REPORTS

(1) Reassignment on Departure of Supervisor

A supervisor who is to be reassigned or who is leaving the Agency will prepare Fitness Reports (Performance - Part I) on employees under his immediate supervision before his departure. ~~If the~~

~~supervisor is being separated for cause, however, such report will be prepared by the supervisor next higher in authority. Such reports are not required for any employee who is reassigned or who is leaving the Agency within the previous 90 days.~~

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(2) Proposed Reassignment of Employees Between Offices

A Fitness Report (Performance - Part I) will accompany the Standard Form 52: Request for Personnel Action, requesting the reassignment of an employee between jurisdictions of Operating Officials* except when a report has been prepared for some other purpose within the preceding 90 days. The Report in these cases must be considered by the requesting office prior to initiating the Standard Form 52 and will be used by the Office of Personnel as a Guide in considering approval of the proposed reassignment. Except in unusual cases the Office of Personnel will not approve a proposed reassignment unless such a report is of record.

(3) Reassignment of Employee Within Areas of Jurisdiction of Operating Officials

A Fitness Report (Performance - Part I) and Standard Form 52 will be prepared when an employee is reassigned within the area of jurisdiction of an Operating Official except when a report has been prepared within the previous 90 days. However, such a report will not be required if the reassignment involves neither a change of supervisors nor a significant change in the duties of the employee.

*Operating Officials include: Chiefs of Senior Staffs and Area Divisions under the jurisdiction of the Deputy Director (Plans); Assistant Directors under the jurisdiction of the Deputy Director (Intelligence); and Chiefs of Staffs, the Comptroller, the General Counsel, and Directors of Offices under the jurisdiction of the Deputy Director (Support).

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d. SPECIAL REPORTS

Other Fitness Reports will be prepared, as necessary, to meet the requirements of special circumstances.

5. REPORT PROCEDURES

a. INITIATION OF REPORTS

- (1) Advance lists of initial and annual reports due will be prepared by the Office of Personnel and disseminated to Administrative or Personnel Officers on or before the 15th day of each month. These advance lists will contain the names of headquarters employees effected and the due dates and types of reports required.
- (2) Reassignment reports will be prepared in accordance with the provisions of this regulation without advance notice from the Office of Personnel.
- (3) Special reports will be prepared as directed by the Operating Official concerned, or head of the employee's Career Service Board, if different from the Operating Official.

b. PREPARATION OF REPORTS

The Fitness Report will be prepared in triplicate. The supervisor completing the report will transmit it to the reviewing official. After reviewing and signing the forms, the reviewing official will transmit all three copies to the Administrative or Personnel Officer concerned who will forward the original and one copy directly to the Office of Personnel and

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the copy to the Head of the Career Service Board concerned within
15 workdays following the expiration of the period covered by the
report.

6. REPORTS OF UNSATISFACTORY SERVICE

- a. A Fitness Report ~~recommending the separation of an employee or judging~~
him to be incompetent will ~~not~~ be ~~submitted~~ ^{accompanied by a copy of a warning} without first officially
~~notifying the employee in writing of the deficiencies in his performance,~~
~~and giving him a reasonable period of time (normally not less than 90~~
~~days) with appropriate supervision and on-the-job training in which to~~
~~improve.~~ ^{memorandum} ~~Additional guidance in this respect is provided~~ ^{him}

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General Separation Actions,

- b. When a supervisor's recognition of unsatisfactory performance is
coincidental with the preparation of a Fitness Report, the warning
memorandum ~~indicated in paragraph 6a above~~ will be prepared with the
advice and assistance of the Office of Personnel, and the Fitness Report
will be delayed until the end of the trial period.
- c. If, at the end of the trial period, the supervisor and reviewing official
recommend the separation of the individual, the Fitness Report (Performance -
Part I) will be shown to the employee and the procedures ~~General Separation Actions~~ will be followed.

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L. K. WHITE
Deputy Director
(Support)

*prepared in
accordance with
procedures in*

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